

2024 Annual Update from the ANPT Treasurer:

Hello, I'm Joni Barry, the current ANPT treasurer, and I'm happy to report that our Academy continues to be in a healthy financial position with healthy investments.

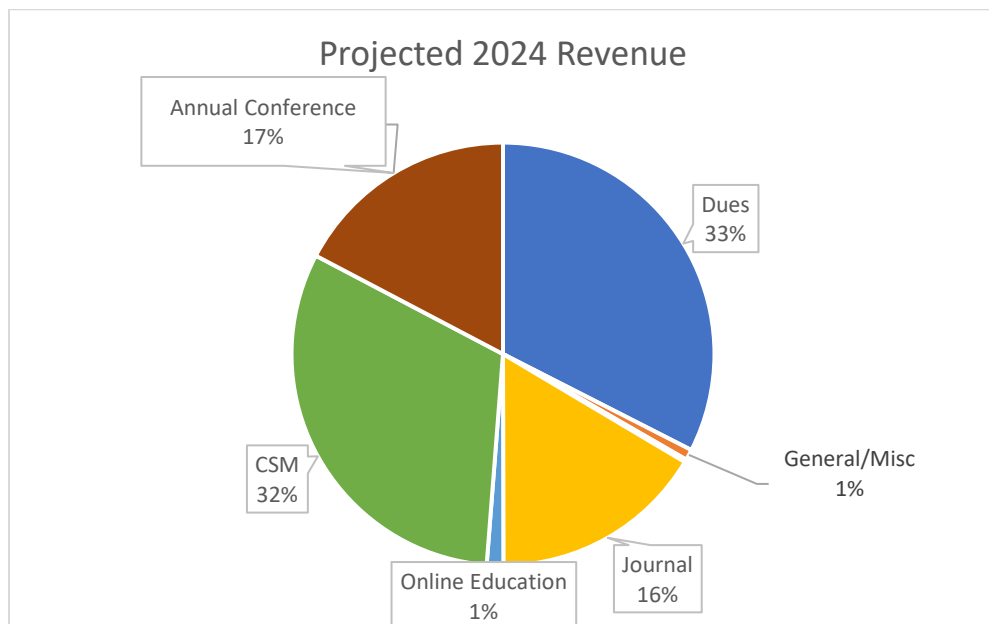
You can see from the figure showing our projected 2024 revenue that your membership dues and attendance at the APTA Combined Section Meetings make up about 65% of our revenue. We are continuing to grow our Annual Conference. In our 2024 expenses, you can see we are strongly committed to producing CPGs and then KT tools to assist in implementation. You also see our mission being fulfilled by spending on grants, advocacy, and updating our website. As we undergo a governance review, we will be reevaluating our programs and looking for ways to improve revenue and your membership's value. I always welcome your ideas and input. You can contact me at jbarry@maryville.edu.

2024 ANPT Budget Overview

In November, the ANPT Board approved the 2024 budget. In an effort to relay the financial picture of the Academy, we are providing the below summary of the projected revenue and expenses.

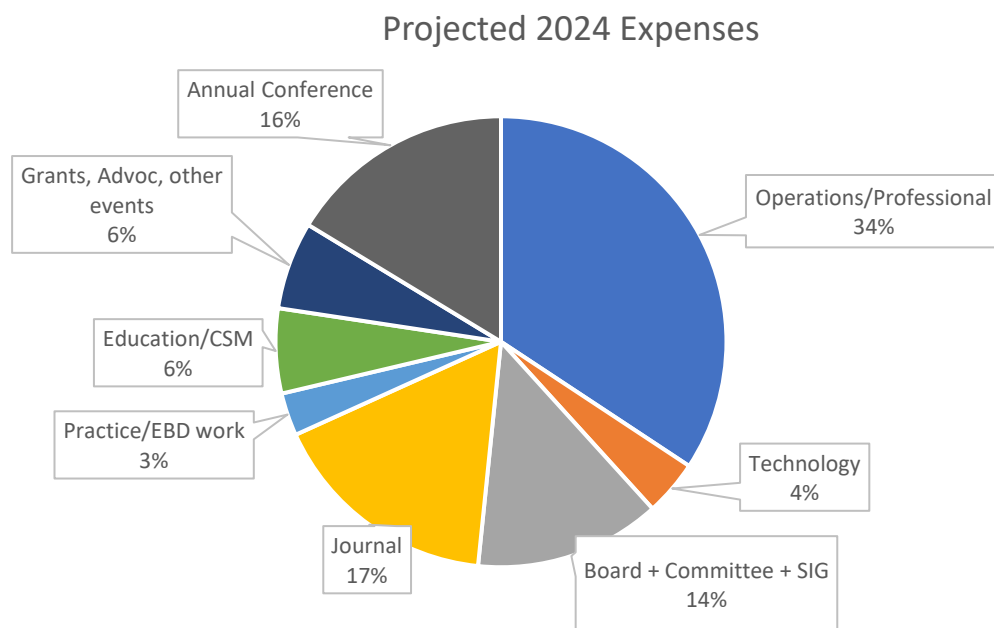
How ANPT is funded:

ANPT revenue is largely from membership dues, CSM revenue and the Annual Conference revenue.



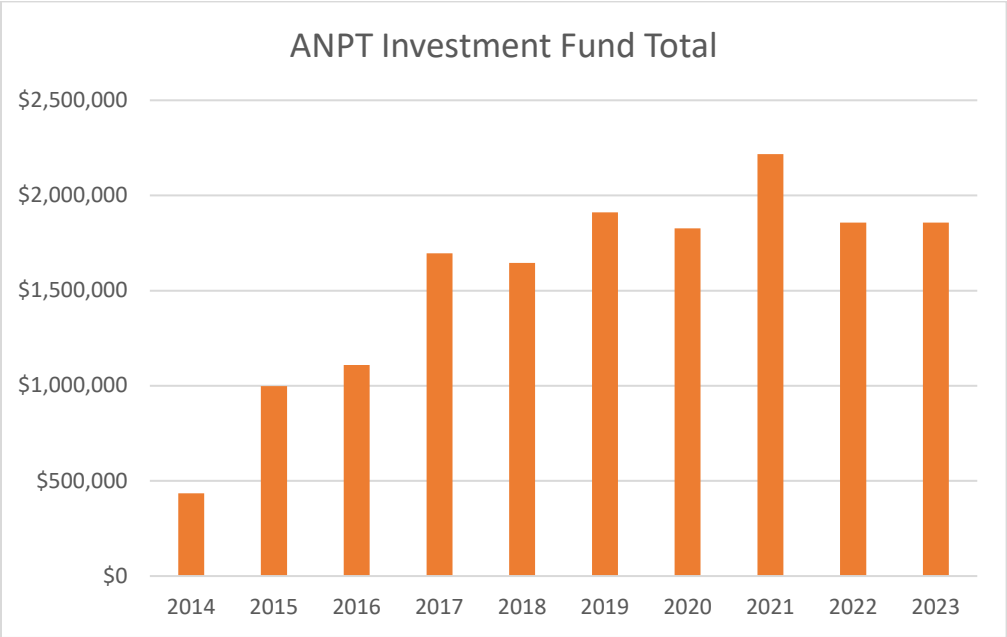
How ANPT expenses are planned:

48% of the budget is programmatic areas- education, practice, grants, journal. ANPT is investing in operational upgrades and opportunities.



Operations includes insurance, audit/tax preparation, legal, management fees, bank & credit card fees, operational projects.

ANPT Investment fund 2014 – 2023 (Sept.)



This chart reflects the actual fund balance for ANPT investment account from 2014 - preliminary (Sept) 2023.

Market values fluctuate based on investment performance.

ANPT financial reserve policy ensures a minimum balance of \$600,000 in investments. Financial reserves ensure an organization has adequate funds to meet unanticipated business situations and/or support for unique business needs/strategic initiatives.